Navigator Grant Funding Informational Webinar

June 9, 2021

Today's Webinar is Presented By:

Health Reform: **Beyond the Basics**

A project of the
Center on Budget
and Policy Priorities

COMMUNITY
Catalyst

NILC

YOUNG YI
INVINCIBLES

Agenda

o Overview of Navigator Program – Inna Rubin, CBPP

o Navigator Grantee Perspectives – Asraa Alhawli, ACCESS

o Grant Writer Perspective – Marianne Chung, [Re]imagine Collective

o Q & A

o NOFO FAQs – Tara Straw, CBPP & Carrie Rogers, Community Catalyst

o Developing Navigator Partnerships – Jodi Ray, FL Covering Kids & Families

o Using the Connector for Reporting – Phelan O'Neill, Young Invincibles

o Q & A

Webinar Logistics

- All attendees are muted and in listen-only mode

- To ask a question:
  - → Click on the Q&A icon at the bottom of your screen
  - → Type your question into the box

- We will pause for Q & A during the presentation and once more at the end

- You can also email questions to beyondthebasics@cbpp.org

- This webinar is being recorded and will be available for viewing at

www.healthreformbeyondthebasics.org

Overview of the Federal Navigator Program

Navigator Program Background

- Navigator program was written into the ACA

- Launched in 2013 with a focus on helping people enroll in coverage on HealthCare.gov

- Program funding was cut by 84% under Trump Administration, reduced to $10 million

- Biden Administration announced $80 million in funding will be available for the 30 states that use HealthCare.gov

Navigator Duties

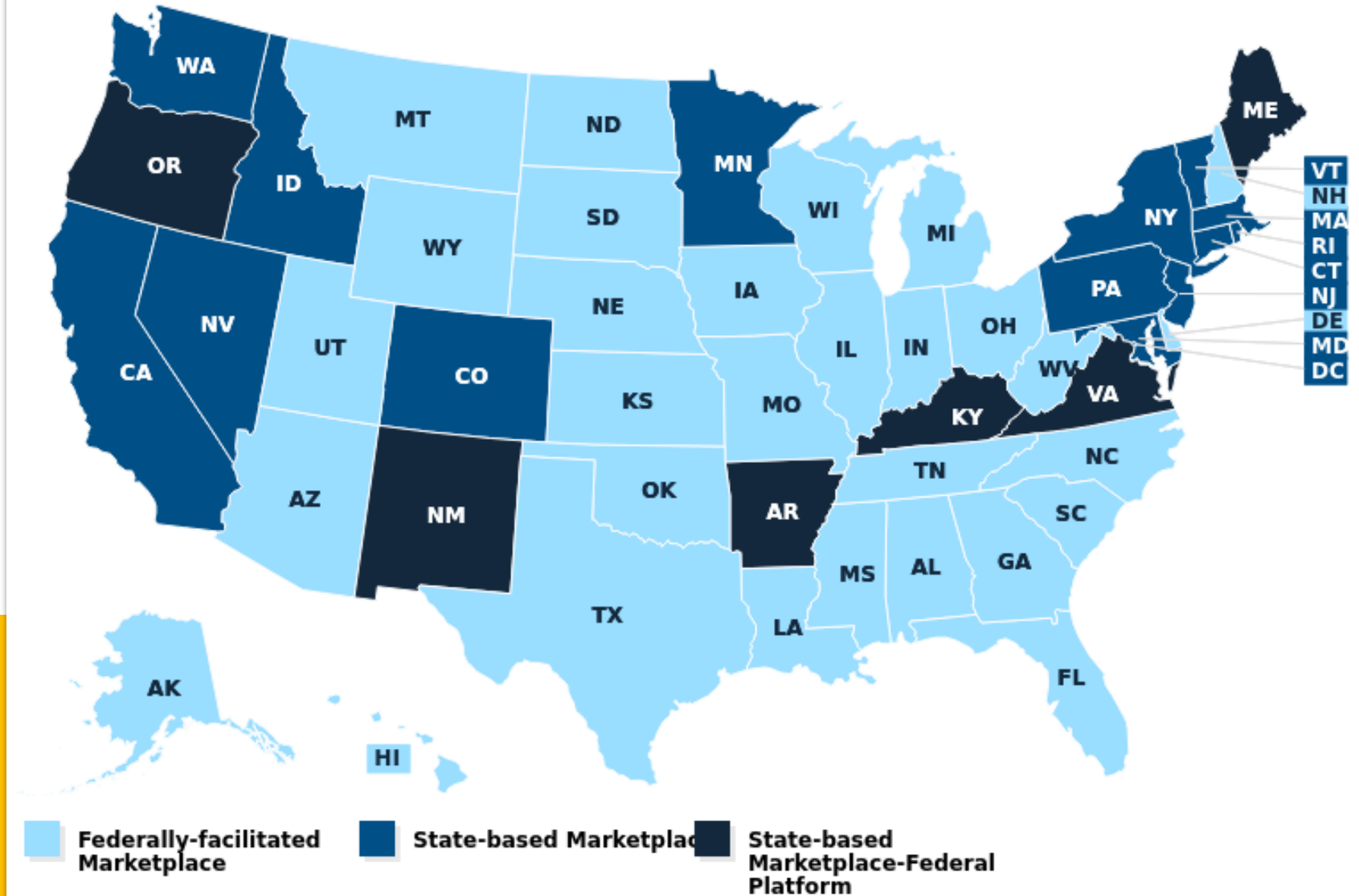The navigator role has expanded over the years to include:

→ Community outreach

→ Medicaid/CHIP enrollment

→ Post-enrollment support

→ Health insurance literacy education

→ Helping find in-network providers

→ Assisting in resolving DMIs, filing appeals, applying for SEPs, etc.

- Navigators have come to serve as trusted community resources

Who Should Apply for Navigator Funding?

- All organizations interested in helping people get covered are encouraged to apply!

- Especially encouraged to apply are:

  → Community-based organizations

  → Organizations that work in/with communities of color and/or underserved communities and hard to reach communities

  → Organizations that have deep roots in their communities and are viewed as trusted messengers

- Experience with providing enrollment assistance is great but not a prerequisite!

  → Free navigator training and resources are available.

- Types of organizations that have been funded in the past include food banks, health centers, legal aid organizations, community resource centers, Native American tribal organizations, among others.

States Eligible for Federal Navigator Funding

State Health Insurance Marketplace Types, 2021: Marketplace Type, 2021

Legend:
- Federally-facilitated Marketplace
- State-based Marketplace
- State-based Marketplace-Federal Platform

SOURCE: Kaiser Family Foundation's State Health Facts.
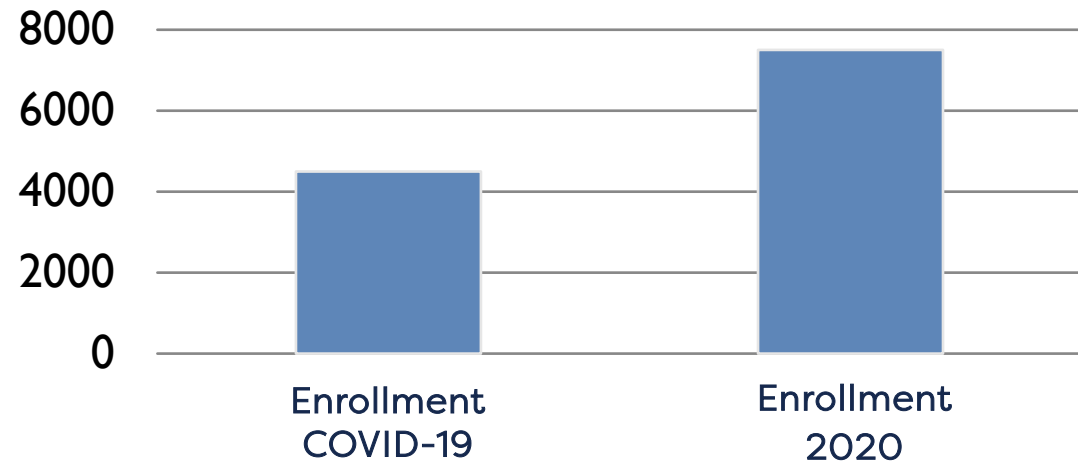
Navigator Grantee Perspective

ACCESS

assisting. improving. empowering.

ACCESS has been assisting all individuals with health insurance needs through the Navigator Program since the first open enrollment period

Navigators are Bridging the Gap

- Removing barriers that racial/ethnic minorities face when navigating their health insurance options such as:
  - → Low health literacy and limited English proficiency

- Improve the health of racial/ethnic minorities

- Assist individuals in accessing and navigating the health care system

- Addressing the chilling effect of policies that impact immigrant and low-income communities such as:
  - → Public Charge
  - → Medicaid Work Requirements

Grant Writer Perspective

Top 5 Ways to Get Funded

1. Read the NOFO
2. Read the NOFO
3. READ THE NOFO
4. READ THE NOFO!
5. READ THE NOFO!!!

Know What You Are Getting Into

$80M IN FUNDS TO NAVIGATORS to increase Marketplace education, outreach & enrollment in underserved & diverse communities

CMS

- Read, read, read the NOFO

- Outline the requirements

- Develop a proposal checklist and delegate responsibilities

- Create a timeline and always plan for the unexpected

The Basics

- **Due Date – Tuesday, July 6 at 3pm EST**

- Attend TA sessions:
  - → Wednesday, June 9, 2021, 3- 4:30pm EST
  - → Monday, June 28, 2021, 3-4:30pm EST

- In order to apply, you must have:
  - → EIN
  - → DUNS number
  - → SAM registration
  - → Grants.gov account

A4. Program Requirements pg. 8

These regulations establish duties that are required of all recipients of funding under this Funding Opportunity, including, but not limited to:

- Conducting public education activities to raise awareness about the Exchange;

- Facilitating selection of a QHP;

- Providing information in a manner that is culturally and linguistically appropriate to the needs of the population served by the Exchange, including individuals with limited English proficiency, and ensuring accessibility and usability of Navigator tools and functions for individuals with disabilities;

- Providing referrals to any applicable office of health insurance consumer assistance or health insurance ombudsman established under section 2793 of the Public Health Service Act, or any other appropriate state agency or agencies, for any enrollee with a grievance, complaint, or question regarding their health plan, coverage, or a determination under such plan or coverage;

- Complying with applicable training and conflict of interest standards;

- Obtaining the authorization of applicants for coverage available through an Exchange application prior to accessing their personally identifiable information; and

- Providing targeted assistance to serve underserved or vulnerable[8] populations, as identified by the Exchange, within the Exchange service area.

Tips for Writing the Narrative

A4. Program Requirements (pg 8)

D2. Content and Form of Application Submission - Project Narrative (pg 32)

E. Application Review Information - Review Criteria (pg 46)

D2. Content and Form of Application Submission (pg 32)

d. Project Narrative (maximum of 20 pages)

The project narrative must be no more than 20 pages in length and is expected to address in a detailed, chronological, and organized manner all of the required elements included below. The applicant should explain how they plan to implement the first year of the multi-year cooperative agreement, and ultimately, meet the objective of providing Navigator services as outlined in 45 C.F.R. §§ 155.210 and 155.215. In addition, the applicant should include a high-level discussion of its plans for years two and three of the period of performance.

Under each element below, current Navigator awardees should provide information which is inclusive of activities funded or performed under their current HHS Navigator award and also distinguish any activities currently being funded through an HHS Navigator cooperative agreement from any new activities to be supported through this Funding Opportunity.

1. **Type of entity and description of the community(ies) or group(s) the applicant expects to serve**

- Applicants must clearly specify in the introduction of the Project Narrative whether they are current and/or past HHS Navigator awardees, or if they will be a new Navigator awardee.
- Applicants must list who will perform Navigator activities under this cooperative agreement (individual, entity, or consortium).
  - In the case of an entity or consortium performing Navigator activities, the applicant must describe the type of entity and provide a description of the organizational structure(s) of the entity or consortium, the role of each consortium member, the value they will add to the proposed project, and which consortium members will be paid with Navigator cooperative agreement funds to carry out Navigator activities.

D2. Content and Form of Application Submission (pg 32)

- Applicants must also describe:
  - The community(ies) or population(s) they expect to target and why;
    - Applicants that demonstrate a focus and commitment to target those populations or communities defined in this Funding Opportunity as being underserved or vulnerable, while also being prepared to assist any consumer seeking assistance, will receive a higher score in this category than applicants that do not.
  - The FFE state(s) and county(ies) in which this(ese) population(s) reside(s), and the reason for expecting that they will focus their efforts on primarily that (those) population(s) or community(ies); and
  - The percentage of the state's uninsured population encompassed in the population(s) or community(ies) they expect to serve.
- Applicants proposing to serve in multiple areas of an FFE, or across multiple FFE states, are also expected to describe how they will balance their efforts among the different areas based on the needs of the uninsured populations in those areas.
  - Applicants proposing to serve across multiple FFEs *must also submit separate project (metric) goals (see* sub-section e3. *Plan Year 2021-2022 Project Goals*) for each FFE they are proposing to serve.
  - Tribal Applicants should list the federally recognized Indian Tribal lands of their target Tribal population, the counties covered, and how they plan to serve the different geographic areas of their target population in their application.

Tips for Writing the Narrative

A4. Program Requirements (pg 8)

D2. Content and Form of Application Submission - Project Narrative (pg 32)

E. Application Review Information - Review Criteria (pg 46)

E. Application Review Information - Review Criteria (pg 46)

The review criteria are as follows (based on 200 points[33]):

Project Narrative Topics	Total Available Points	Scoring Criteria Breakdown

Type of entity and description of the community(ies) or group(s) the applicant expects to serve	25	• **(2 points)** Applicants must clearly specify in the introduction of the Project Narrative whether they are current and/or past HHS Navigator awardees, or if they will be a new Navigator awardee.
		
		• **(5 points)** Applicants must list who will perform Navigator activities under this cooperative agreement (individual, entity, or consortium).
		  ▪ In the case of an entity or consortium performing Navigator activities, the applicant must describe the type of entity and provide a description of the organizational structure(s) of the entity or consortium, the role of each consortium member, the value they will add to the proposed project, and which consortium members will be paid with Navigator cooperative agreement funds to carry out Navigator activities.
		
		• **(13 points total)** Applicant must also describe:
		  • **(8 points)** The community(ies) or population(s) they expect to target and why.
		    ▪ Applicants that demonstrate a focus and commitment to target those populations or communities defined in this Funding Opportunity as being underserved or vulnerable, while also being prepared to assist any consumer seeking assistance, will receive a higher score in this category than applicants that do not.

E. Application Review Information - Review Criteria (pg 46)

Project Narrative Topics	Total Available Points	Scoring Criteria Breakdown

		▪ **(3 points)** The FFE state(s) and county(ies) in which this(ese) population(s) reside(s), and the reason for expecting that they will focus their efforts on primarily that (those) population(s) or community(ies).
		  ▪ Applicants proposing to serve across multiple FFE states, are also expected to describe how they will balance their efforts among the different areas based on the needs of the underserved or vulnerable population(s) in each state.
		  ▪ Tribal Applicants should list the federally recognized Indian Tribal lands of their target Tribal population, the counties covered, and how they plan to serve the different geographic areas of their target population in their application.
		 ▪ **(2 points)** The percentage of the state's uninsured population encompassed in the population(s) or community(ies) they expect to serve.
		 • **(5 points)** Applicants should carefully develop project (metric) goals for carrying out Navigator activities during the first 12-month period budget period of the 36-month period of performance (*see also* sub-section e3. *Plan Year 2021-2022 Project Goals*)
		  ▪ Applicants proposing to serve across multiple FFEs must submit separate project (metric) goals for each FFE they are proposing to serve.

Scope of Activities	75	**The applicant's plan must demonstrate how the applicant will:** • **(10 points)** Conduct public education and outreach activities to raise awareness about the FFEs and help consumers understand their health coverage options, including:

How Many Pages Per Narrative Topic?

Narrative Topic	Total points available	Suggested page count
Type of entity and description of community(ies) or group(s) that applicant expects to serve	25	3
Scope of Activities	75	8
Plan Year 2021 - 2022 Goals	--	--
Ensuring Privacy and Security of Consumer Personally Identifiable Information (PII)	30	3
Accomplishments	25	2.5
Expertise of Personnel	35	3.5
Budget (separate 10 pages)	10	--
Total	200	20

Wrapping Up

- EASY TO READ

  → Well organized, well designed

  → Accurate references

  → Format and fonts (COMPLY!!)

  → Check for spelling and grammar

- LANGUAGE & TONE

  → Use active and language in the NOFO

  → How is your organization different from the others that submitted an application?

Questions?

FAQs on the Notice of Funding Opportunity

Who is Eligible for This Award?

- This funding opportunity is open to a wide range of groups, including (p.22-23):
    → Community and consumer-focused non-profits
    → Government organizations
    → Education organizations
    → Public housing organizations
    → Indian tribes and tribal organizations

- Applicants must demonstrate that they have existing relationships in the communities they would serve, or could build those relationships; have had past success; and will provide information in a fair, accurate, and impartial manner (p.24)

Who is <u>Not</u> Eligible to Receive Navigator Funding?

- An organization cannot be a Navigator if it receives *any direct or indirect consideration* from an insurer *in connection with the enrollment of any individuals or employees in a QHP or non-QHP* (p.25)

- Narrow exceptions:
  - → Health providers who receive money from insurers only as consideration for services performed
  - → (Implicitly) Funding from an insurer received for something *other than* enrollment in a QHP or non-QHP

- <u>Every applicant</u> must include a statement in their cover letter attesting that they are not an ineligible entity

- Complex situation? Contact NavigatorGrants@cms.hhs.gov

Should We Collaborate With Other Groups in the State Or Submit Our Own Application?

- This is your decision. In deciding, you might want to consider things like:
    → Whether there is an existing coalition to partner with
    → Whether your organization has the capacity to administer a federal grant, including reporting requirements
    → Whether you want to focus on a specific function, like performing outreach, instead of taking on the entire scope of Navigator activities

See page 23

Who is
Our Target
Population?

- Uninsured and underinsured people, with a particular emphasis on certain underserved or vulnerable communities, including (p.24 for complete list):
    - → Communities of color
    - → Rural communities
    - → LGBTQ individuals
    - → Medicaid-eligible consumers who are not enrolled in coverage
    - → Low-income or homeless individuals
    - → Other underserved or vulnerable populations in your community, as proposed in your application and approved by HHS
- See data here: https://aspe.hhs.gov/pdf-report/estimates-of-the-qhp-eligible-uninsured

What Training and Certifications are Required?

- All individual Navigators must complete HHS-developed training program and pass an online exam through the Marketplace Learning Management System (MLMS)

- Must have federal certification before performing any Navigator duties

- Completion of Navigator training and recertification are required on annual basis

- Must also comply with any state-specific requirements, so long as these state-specific requirements do not prevent application of the provisions of Title I of the ACA (pg.11)

- Current training information for reference is found here: https://marketplace.cms.gov/technical-assistance-resources/training-materials/training (NOTE: Navigator training for the 2022 plan year is not yet available)

What are the reporting requirements?

- Weekly, monthly, quarterly, annual, and final reporting is required
  - → Progress Reporting (pg. 67)
    - o How funds were used
    - o Program progress
    - o Barriers
    - o How program ensured access to culturally and linguistically appropriate services
    - o Detail measurable outcomes (how many people served)
  - → Financial Reporting (pg. 68)
- Reporting is submitted electronically
- CMS will provide reporting forms and technical assistance to grantees

How Many Cooperative Agreements Will Be Awarded?

- 85-120 cooperative agreements will be awarded across 30 Federally-Facilitated Exchange (FFE) states (pg. 21)

- Multiple awards can be issued for each state

- There is not a maximum number of awards that must be issued for each state

What's The Difference Between a Navigator and a Certified Application Counselor (CAC)?

- A Navigator is a trained, certified, and funded enrollment partner that agrees to take on a wide range of outreach, enrollment, and post-enrollment activities

- A CAC is unfunded and can focus on a more limited set of activities (but still must meet certain training and certification requirements)

  → To operate as a CAC, your group must be registered as a Certified Application Counselor Designated Organization (CDO).

  → Registration for new applicants is June 1 – Aug 31. Groups with an existing CDO agreement don't need to re-apply.

  → https://marketplace.cms.gov/certified-application-counselor-designated-organization-cdo-program-information

Developing Navigator Partnerships

Components of Successful Partnerships

- The Key: Partnerships are Mutually Beneficial

- Formal Partnerships:
    - →Regional
    - →Understand the work
    - →Easy access to vulnerable populations
    - →Communicate expectations
    - →Offer support

Informal Partnerships

- Partner assists the populations you are targeting

- Strong understanding of application assistance

- "Warm referral" process

- Frequent communication, provide updates

The Connector & Grant Reporting

Reporting can be time consuming.

The Connector makes it easy!

- With over 600,000 appointments since 2014, The Connector is the leading data reporting and scheduling tool for Navigators
- One place to:
  - → Manage Schedules
  - → Promote Availability
  - → Share locations and hours with partners
  - → Collect data
  - → Build reports
- Assisters are reminded by email to enter data from past appointments
- Tracks everything you need for CMS reporting

Interested?

Contact Phelan to learn more!

- Connector is free for Navigators & used by Navigators on this call!

- Email: Phelan.Oneill@younginvincibles.org

- Fill out this form and we'll reach out! http://bit.ly/Connector2021

Questions?

Important Links

- Funding announcement can be viewed here: https://www.grants.gov/web/grants/view-opportunity.html?oppId=332990

- CMS TA webinar, June 9, 3 – 4pm: https://goto.webcasts.com/starthere.jsp?ei=1418490&tp_key=a3299cfc8e

- CMS TA webinar, June 28, 3 – 4pm: https://goto.webcasts.com/starthere.jsp?ei=1470197&tp_key=d748689859

- Jodi Ray, FL Covering Kids & Families
  - jray@usf.edu

- Asraa Alhawli, ACCESS
  - AAlhawli@accesscommunity.org

- Carrie Rogers, Community Catalyst
  - crogers@communitycatalyst.org

- Tara Straw, CBPP
  - tstraw@cbpp.org

- Inna Rubin, CBPP
  - irubin@cbpp.org

- Marianne Chung, [Re]imagine Collective
  - marianne@reimaginecollective.co

- Mina Shultz, Young Invincibles
  - mina.schultz@younginvincibles.org

Contact

The recording of this webinar
will be available at
www.healthreformbeyondthebasics.org